

# Duplicate Client Check

**Purpose:** When creating a new Client Profile or accepting a Referral, WITS will search ALL DHW REGIONS for clients with:

- First 3 characters of first name, first 3 characters of last name, and year of birth and will exclude clients with first or last name with less than 3 characters.  
OR
- First character of first name and last 4 numbers of SSN (excluding SSN = 0000)  
OR
- Soundex\* of first name, Soundex of last name, and year of birth  
OR
- Soundex of first name and last 4 numbers of SSN (excluding SSN = 0000)

**Note:** When completing a designated examination (DE), enter the record into WITS according to the region where the clinician is assigned, not in the region where the client lives/receives services. For example: Clinician Sally is located in Region 2, but is helping Region 1 by performing a DE for a client located in Region 1. Sally will enter the DE into WITS in Region 2.

\*Soundex is a phonetic algorithm for indexing names by sound as pronounced in English. This will allow WITS to match names despite minor differences in spelling.

Accepting a Referral

1. Getting here: Login, click **Agency, Referrals, Referrals In** on the Navigation Pane (left menu).

2. Enter the search criteria.

3. Click .

4. Hover over  under Actions and click **Review**.

User: A, Clinical Supervisor | Location: IDHW, DBH, Region 6, Pocatello

Snapshot

Home Page

Agency Contacts

Agency

Agency List

Aliases

Contacts

Referrals

Referrals

Authorizations

Referrals Out

Wait List

Health Information Mgmt

Vendor Management

Clinical Dashboard

Client List

Referrals In Search

Referral Status Codes

Placed/Accepted

Referral Created/Pending

Referral Terminated

Refused Treatment

Search Criteria

Unique Client Number

Created Date

Referred Date

First Name

Last Name

da\*

Clear

Go

Referrals for Pocatello

(Export)

Actions	Unique Client #	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments

Referrals In Search

Referral Status Codes

Placed/Accepted

Referral Terminated

Refused Treatment

Rejected by Program

Search Criteria

Referral Created/Pending

Unique Client Number

Created Date

Referred Date

First Name

Last Name


da\*

Clear

Go

Referrals for Pocatello

(Export)

Actions	Unique Client #	Client Name	DOB	Created Date	Referring Agency/Facility	Referred To Modality	Referral Status	Ref to Facility	Referral Comments
	209151880000150	Dae, Sumr	9/15/1988	7/1/2016	IDHW, DBH, Region 2/Lewiston	Assessment	Referral Created/Pending	Pocatello	
<div>Review</div>									



5. Update the Appointment Date and Status if appropriate.

6. Change the Referral Status to **Placed Accepted**.

7. Click .

8. A list of similar clients displays. Click **Select** if one of the clients displayed matches your client. If you select a similar client from the list, the most recently updated Client Profile will be created in your Region.

What if none of the clients listed is my client?

- Click  to continue and create a new Client Profile.
- OR
- Click  to cancel the creation of the Client Profile.

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	20815188000019U	Day, Summer	8/15/1988	000-00-0000	Female
	20815188000019U	Dae, Sumr	9/15/1988	000-00-0000	Female

9. A Client Profile with information from the selected client will be created in your region, including:

- Client Name & other demographic information
- Alternate Names (if any)
- Additional Information
- Contact Information, including all addresses
- Allergies (if any)
- Benefit Application (if any).

10. Click  .

Client: Day, Summer | 20815188000019U

Clear Client

Profile

First NameSummer

Middle Name

Last NameDay

Suffix

GenderFemale

DOB8/15/1988

SSN000-00-0000

Driver's License

Access CategoryAdult

Has paper file

Provider Client ID

Unique Client Number20815188000019U

State Client ID

Record Created ByBuskey, Michelle

Last Updated ByBuskey, Michelle

Created Date7/1/2016 5:46 PM

Last Updated Date7/1/2016 5:46 PM

Date of Death

Administrative Actions

Download c32

View c32

Cancel

Save

Finish

Alternate Names

Actions	Last Name	First Name	Middle Name	Client Alias Type
		Sunny		Nickname

Addresses

Actions	Address Type	Address	Confidential	Created	Updated
	Client Home	123 A Street Melba, ID 84512	No	7/1/2016	7/1/2016
	Client Mailing	PO Box 123	No	7/1/2016	7/1/2016

## Creating a Client Profile

1. Getting here: Login, click **Client List** on the Navigation Pane (left menu). **Search for the client.** If you are unable to find the client, click **Add Client**.

**Note:** When completing a designated examination (DE), enter the record into WITS according to the region where the clinician is assigned, not in the region where the client lives/receives services.

- **Example:** Clinician Sally is located in Region 2, but is helping Region 1 by performing a DE for a client located in Region 1. Sally will enter the DE into WITS in Region 2.

Client Search

Agency IDHW, DBH, Region 6

First Name

SSN

Idaho-WITS Training Client Id

Unique Client Number

Treatment Staff

Case Status All Clients

Other Number

Include Only Active Consents Yes

Facility

Last Name

DOB

Provider Client ID

Primary Care Staff

Intake Staff

Number Type

Clear

Go

Client List (Export) [Add Client](#)

Actions	<a href="#">Unique Client #</a>	<a href="#">Full Name</a>	<a href="#">DOB</a>	<a href="#">SSN</a>	<a href="#">Gender</a>

Clients with Consents from Outside Agencies


Actions	<a href="#">Agency</a>	<a href="#">Unique Client #</a>	<a href="#">Client Name</a>	<a href="#">DOB</a>	<a href="#">SSN</a>	<a href="#">Gender</a>

2. Complete all required (yellow) fields.

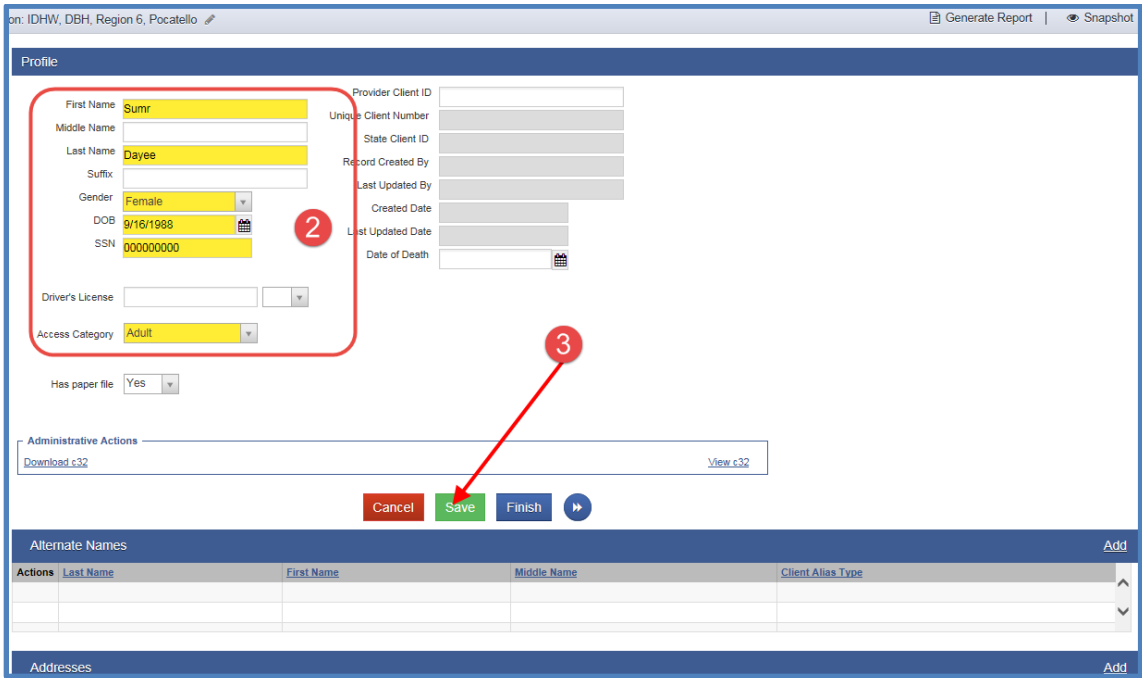
3. Click  .

4. A list of similar clients displays. Click **Select** if one of the clients displayed matches your client. If you select a similar client from the list, the most recently updated Client Profile will be created in your Region.

What if none of the clients listed is my client?

- Click  to continue and create a new Client Profile.  
OR

- Click  to cancel the creation of a Client Profile.



on: IDHW, DBH, Region 6, Pocatello [Generate Report](#) | [Snapshot](#)

**Profile**

First Name: Sumr  
Middle Name:   
Last Name: Dayee  
Suffix:   
Gender: Female  
DOB: 9/16/1988  
SSN: 000000000  
Driver's License:   
Access Category: Adult  
Has paper file: Yes

Provider Client ID:   
Unique Client Number:   
State Client ID:   
Record Created By:   
Last Updated By:   
Created Date:   
Last Updated Date:   
Date of Death:

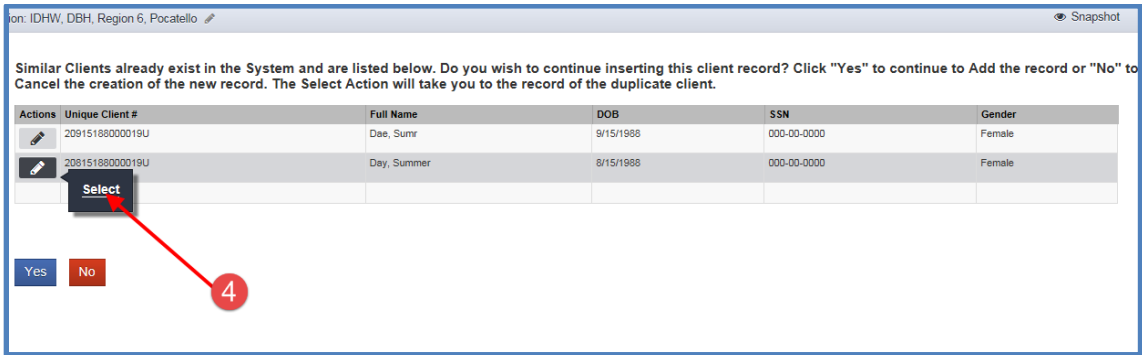
Administrative Actions: [Download c32](#) [View c32](#)

[Cancel](#) [Save](#) [Finish](#) [Next](#)

**Alternate Names** [Add](#)

Actions	Last Name	First Name	Middle Name	Client Alias Type

**Addresses** [Add](#)



on: IDHW, DBH, Region 6, Pocatello [Snapshot](#)

Similar Clients already exist in the System and are listed below. Do you wish to continue inserting this client record? Click "Yes" to continue to Add the record or "No" to Cancel the creation of the new record. The Select Action will take you to the record of the duplicate client.

Actions	Unique Client #	Full Name	DOB	SSN	Gender
	20915188000019U	Dae, Sumr	9/15/1988	000-00-0000	Female
	20815188000019U	Day, Summer	8/15/1988	000-00-0000	Female

[Select](#) [Yes](#) [No](#)

5. A Client Profile with information from the selected client will be created in your region, including:

- Client Name & other demographic information
- Alternate Names (if any)
- Additional Information
- Contact Information, including all addresses
- Allergies (if any)
- Benefit Application (if any).

6. Click .

**Client:** Day, Summer | 20815188000019U [Clear Client](#)

### Profile

First Name	Summer	Provider Client ID	
Middle Name		Unique Client Number	20815188000019U
Last Name	Day	State Client ID	
Suffix		Record Created By	Buskey, Michelle
Gender	Female	Last Updated By	Buskey, Michelle
DOB	8/15/1988	Created Date	7/1/2016 5:46 PM
SSN	000-00-0000	Last Updated Date	7/1/2016 5:46 PM
		Date of Death	
Driver's License			
Access Category	Adult		
Has paper file			

**Administrative Actions** [Download c32](#) [View c32](#)

[Cancel](#) [Save](#) [Finish](#) [Next](#)

### Alternate Names

Actions	Last Name	First Name	Middle Name	Client Alias Type
		Sunny		Nickname

### Addresses

Actions	Address Type	Address	Confidential	Created	Updated
	Client Home	123 A Street Melba, ID 84512	No	7/1/2016	7/1/2016
	Client Mailing	PO Box 123	No	7/1/2016	7/1/2016